



## PRIMER MICHAELS

**RE: Temple Beth Ami's 2020 Vision: House Meeting Notes & Next Steps**  
**Date: March 2018**

### **Vision 2020 Background**

In preparation for strategic planning, the board invited the congregation to participate in a series of small group sessions (house meetings) to provide input on four questions:

1. What do you find compelling about being a member of a synagogue?
2. What would be missed if TBA went away?
3. What would you consider to be meaningful evidence of TBA's success, evidence that we are fulfilling our vision and purpose?
4. What could be changed to better meet your needs and interests?

The purpose of these questions was to glean what's in congregants' hearts and minds with regard to the shared vision for TBA, in the context of a first draft for the board's consideration in its April workshop. The vision will continue to be honed until the board votes on the plan by the end of the calendar year.

### **Vision 2020: Phase 1 Report**

This report is divided into four sections:

- Net Summary
  - Cultural Shifts Indicated
  - Anticipated Outcomes of Cultural Shifts
  - Next Steps
- House Meeting
  - Desires/Strengths/Assets
  - Areas of Focus / Change
- Participant Input On Each Question
- Appendix
  - An introduction to vision work (its place in organizational & leadership effectiveness)
  - Specific suggestions from participants (set in a recommended board committee framework)

*707 N. Skokie Blvd., Suite 600, Northbrook, IL 60062*

*Phone 847/729-3508*

*Email: [info@primermichaels.com](mailto:info@primermichaels.com); [www.primermichaels.com](http://www.primermichaels.com)*

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## I. Net Summary: What is our congregational vision for TBA?

The Steering Committee successfully completed a major step in TBA's 2020 strategic planning initiative, the vision journey. With robust engagement from about 250 congregants participating in 21 meetings, we have gleaned rich information to inform the board's work going forward.

The goal of the House Meeting initiative was to tap the congregation's interests and passions relative to synagogue affiliation in general, TBA's role in their lives today, measures of TBA's sustainable success and ideas for improvement. This information will be used to articulate TBA's ten year vision, which the board will discuss during its April retreat. See section 2, page 3 for the components of a strong vision.

TBA's proud and durable reputation for meaningful, quality religious study, services, spiritual support, education, social action, programming and heartfelt community comes through loud and clear. Areas for improvement will not be surprising and are coupled with an expansive set of ideas and suggestions from which the developmental work can begin.

### Cultural Shifts:

The hard work is contained in the deep cultural shifts that underpin the House Meeting input and feedback. These shifts can be described as follow (*Direct quotes from the notes in italics*):

1. Moving from **"what's in it for me?"** to **"what makes a sustainable congregation important to me?"**
  - a. Participants are in resounding agreement that continuity of Judaism is personally important and a key driver for membership. Yet, dissatisfaction about the return on investment relative to membership dues is centered on immediate, personal benefit. Using a public school analogy, many see the bulk of their tax bill go to the public schools, yet less than 25% of most communities have school aged children. Many concur that the ongoing investment in good schools is a sound decision on multiple levels. How might this apply to synagogue membership? The real challenge of moving forward is to ensure that the value of spirituality is paramount. We don't want to lose sight of the value, and the member fears that this could happen.
  
2. Moving from a clergy/staff led congregation to that of a **clergy/staff/lay leader partnership**.
  - a. This shift includes a shift **from management to leadership, encompassing what leaders do: engagement, vision, strategy, success measures, funding, empowerment, goal focus and monitoring/ communications**. The board has begun this shift with its current strategic planning initiative. Given 85% of plans fail to be executed, serious commitment to maintain the leadership requirements to see the plan through is the greater challenge. Changing our board meeting agendas are developed is a key part of this change.
  
  - b. This shift entails a transformation change in the way the temple does Jewishness, from **staff led operations to congregational engagement on policies (the expression of the congregational philosophy and general parameters for practices), informed by meaningful, well aligned committee work**. Based on congregant input, potential committees would include:

- Board Development
- Fiscal Stewardship
- Development
- Welcoming
- Engagement (including communications)
- Spirituality
- Education
- Social Action
- Facilities / IT

c. This shift requires a new look at the roles and responsibilities of the temple board, including the **explicit expectations for board members, aligned with TBA’s vision and strategy**. All other points in this section are relevant to board work.

d. Given TBA gets consensus on its new strategy, **the staffing model (key functions) might be examined** in light of the vision. For example, congregants wonder if positions for engaging and coordinating youth and for development should be considered.

e. This shift includes board direction on the **balance points between a large organization and a personalized congregation** to that philosophy can be translated into practice. *The temple must have procedures and rules and at the same time not being too rigid – A series of places between “TBA is your spiritual home” and “TBA, Incorporated”*. These could be vetted through the appropriate committees.

**3. Moving from reactive communications and changes to a commitment to regular stakeholder input, feedback and program improvement.** One of the board’s central responsibilities is stakeholder engagement. The first step in that commitment is investment in and action taken on regular survey work. With this shift, it will become easier and faster for the board to update and refine its strategic goals going forward. Periodic survey work is usually both general (engagement/satisfaction) and specific, as in program assessment. How often should which programs be assessed and improved? A TBA example right now is the call for a thorough assessment of the b’nai mitzvah process.

**4. Moving from a dues dependent financial model to a culture of giving.** Few if any membership organizations exist solely on its dues structure. Serious thinking about what it takes to steward temple sustainability in a way that encompasses the scope and scale of TBA’s vision of spirituality, service and programming is needed.

**5. Generating funds is critical to the shift from traditional communications to the most promising practices in the digital age,** particularly important to our millennial population.

**6. Connected to a digital strategy is the shift from building-bound programming to going where the people are,** whether that be virtual connections for the home or office bound members or using a variety of locales for services and programs.

### **Anticipated outcomes from these shifts include:**

1. An engaged board that uses its precious time, energy and resources in stewardship of TBA's core values, vision, mission, strategy and budget, in concert with regular congregational input and in partnership with clergy and staff.
2. A diverse, thriving congregation that drives creative programming and continuous improvement.
3. Multi-generational opportunities for engagement across spiritual, educational, social justice, and fund development goals.

Please assess the total number and the age of the House Meeting participants in the context of TBA's current profile of engaged members, not total member population. Our process has multiple ways to continue to communicate the proposed vision and plan to the full congregation for input and feedback. At this juncture, the input is thorough and surprisingly consistent, given conversations about vision and strategy have not occurred in some time.

The hard truth of organizational communications is that people who are satisfied generally do not show up for what they deem to be non-essential meetings. No matter how avidly the temple communicates its desire to hear from everyone, is that it takes urgency to really spark attention. We have designed our process to crystallize that urgency, and feed the information to the Board so they can focus their decision-making in the fall.

Meanwhile, we believe we have secured what we need to draft and share compelling vision. Once the Board weighs in at the April retreat, we can write up and share the vision through a variety of channels, gathering feedback for refinement. Our goal is to finalize TBA's vision in time for the High Holidays. What a wonderful milestone that will be!

### **Next Steps**

1. The board and senior clergy /staff convene on April 21<sup>st</sup> and 22<sup>nd</sup> for the first of two strategic planning workshops, using the results of the House Meetings to help consider TBA's picture of a healthy, successful temple in 2020 (and beyond). The results of this workshop will include the first draft of TBA's:
  - a. Vision, Mission and Values
  - b. Strategic Direction
  - c. Ideas for Goals and Measures
2. The results from the April workshop will be posted on line on the TBA Vision 2020 webpage, and vetted with the Advisory Council, the Steering Committee, the Research Teams, and will be included in a congregational survey.
3. Research Teams will convert to Action Teams, aligned with the goals, to continue working on the strategic topics. Action Teams will prepare recommendations for board discussion in their second workshop, which will be scheduled for the fall, following the holidays.

## II. House Meeting Themes

Below is a high level summary of the comments, questions, and ideas that were generated through the house-meeting process.

### Desires /Strengths / Assets

- Deep appreciation for the clergy and spiritual programming: Torah study, services, music, ritual events / holidays and special events like the Picnic Shabbat; support in difficult times
- Deep appreciation for the temple's commitment to inclusiveness, liberal attitude, education and social action.
- Deep commitment to Judaism with generational continuity
- Shared commitment to social action and opportunities to volunteer
- Shared belief that more engagement begets bigger benefit
- Appreciation for the location

### Areas of Focus / Changes

- Developing the board toward leadership that is in sync with the primary principles of effective governance: stakeholder engagement and empowerment, setting and leading from values, vision, mission, strategy and goals, monitoring results while empowering clergy, staff and congregants on the means or ways to produce those results, spending its time on the highest value issues, debates and discussion, and clarified expectations of board members with regular board and board member assessments.
- Generating a robust leadership pipeline, with young singles and families contributing to synagogue life and TBA's future direction.
- Securing financial stability with an aligned dues model and a new culture of giving.
- Creating small group opportunities to connect and engage across all age and stage demographics.
- Attracting, engaging and retaining younger people; appreciation for the competitors for time and money, from both secular and Jewish spirituality/educational perspectives.
- Advancing connectivity, community and communications with significant technological upgrades and web presence
- Generating a vibrant youth culture, including a growing confirmation class and more social opportunities / opportunity to connect
- Changing from using our temple assets/resources only when in need (filling voids) to wanting to use them more (desires); more engagement all the way around.

## III. Participant Responses to Our Questions

**Questions 1 & 2: *What do you find compelling about being a member of a synagogue?***

***What would be missed if TBA went away?***

### **Sense of Continuity with a Close, Inclusive Community / Culture**

- Continuity: Staying true to the tribe; Keeping Jewish culture alive; Perpetuation of Judaism; generational sharing Judaism and opportunities to pass along our Jewish values to our children and grandchildren.

- Support for Judaism beyond local community
- Warm, friendly, inclusive; Diversity of membership (ages, religions, married/single, with or without children, etc.); Generational inclusion
- Celebration and ritual around lifecycle events; sense of belonging
- Friends becoming family
- Community there to protect and band together; sense of security that temple and community is there; environment for healing
  
- A place to mark Jewish life cycle events and the rituals around them – both celebratory (baby naming, bar/bat mitzvah, wedding) and solemn (funeral)
- Outstanding clergy and staff

### **Jewish Identity / Spirituality**

- Perpetuate Jewish population and institutions (Many of us grew up in the shadow of our parents'/grandparents' experiences in World War II and the Holocaust – important to continue the Jewish people and institutions, including for our children who don't have a strong personal sense of Jewish immigration to the US and of WWII)
- Anchors us to Judaism and Jewish community Having a solid, Jewish “home”; Provides a place to think about things don't think about anywhere else; our building ... A physical place to leave everything else outside
- Services; joyous music, compelling music, guitar music, participation by all clergy; Torah study; Variety of services; Innovation re: Judaism; Relationships with clergy, including at lifecycle events; Values of the Reform movement / Liberal Judaism (vs. rules of Conservative/Orthodox); Importance of supporting Jewish institutions;
- Activities in a Jewish context; mechanism to help others - Tikkun Olam; integration into our lives
- Allows levels of Jewish observance, where everyone can be; comfortable. Good spiritual balance; Good balance of Hebrew and English

### **Education & Programming**

- Learning about and practicing Jewish traditions and culture; trips to Israel
- Continuing education and opportunities for lifelong and growth; Something for everyone
- Developing sense of community through the nursery school

### **Tikkun Olam**

- Programs/social action activities
- A source of strong reputation

***Question 3: When we think about celebrating our successes ten years from now... what would be meaningful evidence that we are fulfilling our purpose, our vision?***

**Idea from the house meeting notes for TBA's big three to five year goal:**

- Be a flag / beacon in Montgomery County / regional focal point;
- Beth Ami is a “go-to” place for social, social justice, volunteer, and other activities;
- Social activism outside our community, including continued interfaith / LGBTQ engagement

<p><b>Perspectives</b></p>	<p><b>Ideas for Measures of Success / Key Performance Indicators</b></p> <p>(At its April Retreat, the Board will refine and prioritize TBA’s Key Performance Indicators. This will help to prioritize strategic initiatives and budget allocations)</p>
<p>Community</p>	<p>Engaging students of all ages so they leave home feeling positive about Judaism</p> <p>Our children, when adults, affiliate</p> <p>Bringing non Jewish people in for events / activities; Sharing Judaism with them</p> <p>Strong connection with Israel</p> <p>Built synergy with other congregations (programming / social action / Israel)</p>
<p>Members</p>	<p>A clear member value proposition with stats from the full spectrum of demographics (ages, stages, interfaith, etc.)</p> <p>Young couples and young people are welcomed to the synagogue even if not members – people in their 20’s are attracted, and the temple reaches out to and welcomes them in a social way or presents them with services and programs that meets their needs and wants –</p> <p>Vibrant community of people of various ages who are connected to the institution with social and educational opportunities; more young families</p> <p>Friendship circles</p> <p>Membership is growing and not static with more than 20% engaged regularly</p> <p>Retention of members/less leaving after Bar/Bat Mitzvah</p> <p>Vibrant youth group – dynamic youth group leader – youth involvement and active youth programming; Growing confirmation class</p> <p>Results of regular congregation-wide engagement surveys / satisfaction surveys</p>
<p>Resources</p>	<p>Financial stability; Operating with positive finances – not having to share facilities with other organizations or religions</p> <p>Changed mindset of the community: culture of giving with meaningful fundraising outcomes</p> <p>No mortgage</p> <p>There are different definitions and/or tiers of membership</p> <p>Seniors (on fixed incomes) who can afford to remain as members because their dues are adjusted</p> <p>Excellent building security / processes in place</p>
<p>Operations</p>	<p>There are activities that interest everyone; The temple is meeting the needs of everyone without fragmentation; See a bifurcated membership model depending on needs / wants / age / income</p>

	<p>There are creative solutions to problems</p> <p>Growth in our social action program / engagement &amp; in Kehillahs</p> <p>Use of our facility</p> <p>Nursery school at capacity</p> <p>Upgraded, useful technology</p>
Clergy & Staff	Positive feedback from members
Board	Leadership succession in place; younger board members

**Question 4: What could be changed to better meet your needs/interests?**

(These higher level ideas, combined with specific suggestions in section five, will inform committee work and the board’s prioritization of strategic initiatives)

**Community / Culture/ Communications**

- Create community where members can give input and feel empowered; Membership needs to feel input matters
- Improved attitude from the front office: more respectful, service orientation, welcoming, adaptable / solution oriented
- More opportunities that interest and attract singles
- Stronger online presence and Improved website - more contemporary; Use technology to reach people in other parts of the country who have little connection to Judaism (ex. Virtual minyan)
- Increase culture of volunteering within the synagogue; Philosophy of membership has to change - more of a giving congregation - participation and money
- Doing an excellent job of “audacious hospitality” as a community we don’t do an excellent job of reaching out and being friendly – say we’re doing it – (some disagree saying it’s an individual thing you can’t force)
- Find ways to make our building a place people want to be/bring people in
- Have staff dedicated to communications; Make it easier to register/sign up for stuff
- Temple more like JCC - Social place to be - not just for prayers- Like a north Potomac community center; Be a place to go with friends - like Cava but instead of Cava on a Friday / Saturday night
- Whole building open - social center; Food makes more people come in and eat; Food trucks; Starbucks / coffee bar inside for kids

**Spirituality**

- Main service on Saturday: feels it’s a service for the bar or bat mitzvah family alone. Make it more accessible and friendly to broader community.
- During High Holy Day services, clergy suggest ways to connect with other members in addition to giving information about the High Holy Day Appeal
- Stronger music program (ex. Choir participation at more services)
- Better network for clergy and staff engagement with families during difficult times: phone calls rather than emails or letters



## Education

- Increase number of nursery school families who are members (currently only 20%)
- Increase numbers of students who continue through confirmation
- Jewish mission trips to places other than Israel
- Social programs and religious school offering something of value that lead to kids forming friendships which leads to staying involved and youth groups flourishing
- Create an effective community-centric transition for families who graduate from the nursery school

## Programs

- Look at programs for synergy - enhance and re-envision programs (perhaps sisterhood and brotherhood, one larger organization)
- More speakers and programs similar to those offered at 6<sup>th</sup> and I Synagogue in DC
- For new members – say what are willing to do – establishing a welcoming cadre – invite new members to a dinner – give them a connection – sort of big brother/big sister approach; need for more personal attention to new members, including a possible “buddy system” with peer members over the first year.
- Events during Sunday school hours; Childcare during programming
- More parent / adult programming during religious school, i.e. How to raise a Jewish child in today’s society
- Themes relating to programing ideas:
  - Age groups
    - Re-establish a youth group; Stronger youth program – NFTY, teen connections outside of TBAHigh (ex. Sports teams that play other temples); Highlight youth accomplishments – give them center stage as they like attention
    - Temple retreats for different age groups
    - Plan social programs for millennials (ex. Dance, Jewish soul food dinner), then invite them to join temple committees without requiring them to join the temple
    - Lots of programs for older members including support groups/bereavement groups - provide support/programs so members don’t need to go elsewhere
  - Connectivity
    - Encore chavurah – people sit with people they know, can get cliquish. Better to assign tables randomly. Group is getting to big, better to break down into smaller interest groups.
    - Form Kehillot by neighborhood
    - Initiatives that tie being Jewish to political events, current events, social action, and pop culture
    - Timing of speakers, events to meet the needs of more members (ex. activities for parents to attend during religious school hours)
    - Family field trips; more multi-generational opportunities to engage
  - Secular Ideas
    - Joint programming and theater productions with other temples of all denominations
    - Have programs and events like JCC (exercise classes); trip to library of congress or other places - activities to get to know people

○ Reinventing Shabbat

- Change up the oneg; Open Bar after services / Oneg (Wine / scotch tastings and discussions after services)
- Shabbat movie nights - doesn't always have to be educational / religious focused; bring people in to help people meet people
- Doesn't have to be religious event; poker night; local trips; winery trips or wine tasting at shul
- Themed shabbats/onegs – movie night, book club, game night, family learning, discussions

**Resources**

- Lower dues; Discounted rate for High Holy Day services for older people, whether they are congregants or family members of congregants
- Find ways to control cost
- Nursery school available to nonmembers
- Update Chaverweb (not user friendly)
- Assess our dues consideration process: to what degree is it fully aligned with our values and our stewardship requirements?
- If we assume that more procedural flexibility or personalization would mean a need for more staff, which would cost more money – Instead, perhaps a combination of re-framed procedures affecting members, along with creative ways to more actively engage member volunteers? Ways to even make specific volunteer positions or groups ones that are coveted?

**Board Work**

- Board members are more engaged with congregation; Perhaps board members could hand out fliers at services when they are the rep...so they meet congregants
- More board accountability
- Dues/Membership model restructured – menu of choices based on level of involvement to meet all needs
- Improved outreach

## IV. Appendix

### A. Introduction to Vision Work

**Vision Work:** A well-articulated vision has a few standards to which leaders are attuned. A vision is not an elevator speech or a sound bite. It also does not stand alone. It is an important part of an organization's foundation, along with mission, values, strategy, goals and measures. In the board's April workshop, we will work on vision, mission, values, measures of success and ideas for strategy. In the board's fall workshop, we will finalize specific goals, measures and action planning agreements.

**Vision Defined:** Your picture of the desired future state "mission accomplished" delivers, with enough specificity to:

- Generate enthusiasm
- Understand what difference this future state will make
- Be able to recognize successes along the way

### **The Vision Objective & Key Results**

Articulate the desired future state of our work and why that picture is important in ways that enhance engagement and creativity and that includes:

- a defined performance standard
- a reputable, unique attribute
- a likely strategic pathway
- a few examples of success indicators: anticipated , measurable key results

**Your Vision Story includes....**A vivid description of the future appealing to:

- 1) Logic: The core need to be fulfilled
- 2) Emotion / Empathy: The difference this will make to people
- 3) Ethics: The reasons this is the right thing to do

**Your Vision Story answers questions like:**

- Where are we going?  
*What makes you think that's the direction to take?*
- Why is this direction important?  
*What difference will it make if we go there?*
- What will happen when we get there?  
*What happens if we don't go there?*
- How do I fit in to this picture?  
*What's in this for me if we achieve this vision?*

## **B. Specific Suggestions From Participants**

In anticipation of committee work that typically follows the final strategic plan vote, these ideas are grouped by potential committee topics. TBA's board will wait to consider committee work until the beginning of 2019.

### **Assumptions:**

- A board chair and a staff/clergy liaison for every group. Committee membership is not limited to temple members. However, non-members do not have voting rights.
- Board chairs are responsible for bringing leadership and strategic topics to the full board and operational issues identified by the board to the appropriate committees.
- Every committee has a charter that identifies its purpose and role, including the identification of its annual goals and as appropriate, tie ins with the strategic goals.
- An annual committee assessment is shared, with ideas for improvements / changes for the following year, pertaining to clergy/staff, board, board chair and committee member accomplishments, roles, responsibilities and challenges.

### **Board Development (Board members only, with clergy/staff liaison)**

- Need increased transparency for those who are interested in how TBA is operated and administered. Now it's very difficult/impossible to know what's happening at / about TBA re: financial and other decisions being made – Understand there are sensitivities to having some information “public”, but important to find a middle road and feasible communication channels
  - Sense now that “they” have made decisions – when “they” may even be the Executive Committee more than the Board; need for transparency

- Need ways to know what the Temple's challenges are, and give input, and be heard, and learn the results
- Communication methods/processes to be heard and know what happened – whether it's a positive development or a difficult development to solve, it's important to many to not simply be handed a change
- More clarity and effectiveness re: how committee structures could flow up into a sustainable budget
- Communication: The board tries to be transparent, but what's lacking is we need to provide more info so people are more aware of what the situation is when we ask for money. (For example, last Board meeting (Jan 2018) no one knew that they needed a quorum—so not enough people attended—that's a communication problem. We need to see financial statements so we can understand them in context—where dues go, where donations go, where we are falling behind.
- Balanced “score card” approach to goal setting: financial, membership, community, religious, schools
- More congregational meetings, separate from services
- See other suggestions for board development on page 7.

### **Fiscal Stewardship**

- Obviously need to find a better model for financial stability and for member dues – even if certain aspects of it have to be implemented over time.
  - Dues structure overall now pegged primarily to family structure – Seriously consider other models that can make connection to TBA feasible for different income levels and the levels of services they need from TBA. Nationally, the Reform movement is experimenting and documenting results with several different “dues” models.
  - Perhaps consider incorporating some categories of non-financial contributions to TBA? A sort of in-kind “dues” (commitments) of volunteer time, no-charge expertise, no-charge goods or services – which would otherwise cost the Temple money from the budget
  - Some retirees have had the experience of coming to the Temple to offer services based on their career and other experience – “How can I help?”, and told “We don't need any help.”
  - More engaged volunteers could also include innovative opportunities like mini-internship experiences for post-bar/bat mitzvah / teen volunteers – Volunteer adults (including some retirees?) could mentor the teens, with TBA staff oversight only as needed
  - Loss of “Senior Dues” meant loss of members – even though seniors often need fewer Temple “services” and would have been glad to continue contributing financially if a lower level were acceptable.
  - At the same time, some empty nesters and seniors have more available income to contribute after successful careers, mortgages paid off, and children now self-sufficient – There could be meaningful ways for them to contribute more money – especially if what they were providing could be made more concrete (like sponsor nursery school for a family or sponsor one of TBA's holiday activities – many other examples possible)
- Re-consider how much and when to charge money for various programs:
  - For example, consider charging \$5 per individual, \$10 per couple, \$15 per family for Shabbat dinner aspects provided by TBA? (chicken, challah, other)
  - Speaker programs can be free for members but always have a fee for guests (\$5-\$10 per person depending on the program?) – would help pay for refreshments, and also:
  - If several/many TBA activities – plus obviously religious services – are open to non-members at no charge, what's the incentive for someone to join as a member?

## Welcoming Committee

- Marketing of TBA (big missing piece—no new member activity, no welcome wagon that matches new families with current members, better outreach in the community to list TBA activities in places like Federation newsletter and Darnestown neighborhood newsletter; Marketing and sales are not “dirty words”. We need to reach out, increase communications)
- Continue to offer newly married member’s children a free one year membership and mezuzah
- A big theme is “connection”. So it seems like both membership and member engagement could increase if TBA members (and prospective members) can better know about and be invited into the full range of ways that TBA can meet spiritual, educational, social, community, and social action connection needs of modern Jewish life.
- Lots of possible options of ways to accomplish this, for both families and adults of all ages and stages
  - New member orientation program/session?
  - Ongoing member annual engagement opportunities “update” session(s)?
  - Many (most?) members only see fragments of information and experiences at Beth Ami – Have some type of membership “manual” so everyone can see the full scope, find more points to connect with, and know what processes and guidelines need to be followed? (Could be online in a members-only site so easily update-able; and could be easily referred to by committees, project groups, etc.)
  - A physical short “welcome book”? (loose-leaf binder?)
  - Availability of peer “buddies”? Both at new membership and when entering new phases of life and TBA connection?
  - Special outreach letters or short booklets (with some human contact when possible, like a phone call?) when individuals / families transition from one stage of life to another? (Congratulations and welcome to your new opportunities at TBA) -- Like when child enters nursery school; child enters religious school; accomplishing bar/bat mitzvah; continuing education; going to college; marriage; childbirth; empty nester; retirement; etc.
  - Also special outreach when the transition is a loss (death, divorce, other) – We’re here for you ... here are ways TBA and the TBA family can help support you. (These members are thrust into a different set of life circumstances in every way than the circumstances under which they originally joined Beth Ami.)
- Have active congregation members as helpers putting themselves out to get others involved particularly those on the cusp
- Synagogue helpers draw others in, let them know of events and that people are going and to get registered and go - create group mentality
- Need social people to greet people and introduce them around and make them feel comfortable
- Help people get to know Rabbis as people, not just clergy; Clergy reach out to members they don’t know after services
- Share hobbies and interests; help people connect
- Fairs to better understand opportunities to engage
- People need to be treated respectfully; everyone must be treated respectfully; better sensitivity training for staff; learn how to better interact with congregants; customer service / congregant service
- Make an easy way to drop off dues at office when dropping off / picking up kids
- Captains for services to bring friends in and get them more involved

- Social committees / ambassadors
- Establish a TBA way of welcoming. For example, if someone attends a small to mid-size regularly scheduled gathering who doesn't usually attend – make sure they're personally greeted, introduced to several others, and made to feel welcome. One of the participants in our group said they'd attended a few small-to-medium group activities where she didn't feel nearly as welcome as she did in this house-meeting group where everyone introduced himself or herself with a little information about each of us.
- Have a "buddy system" for new members, where they're matched with (volunteer) current members similar to them (i.e. family with young children, empty nester couple, divorced or widowed individual, etc.) for the first year of membership. The current member(s) would be available as an ongoing resource for asking questions, and could invite them to come to Beth Ami activities appropriate to their situation, offer to sit with them at some services, introduce them to others in the peer group, etc.
- When you join a club or a membership association, you get some type of handbook: Here are all the activities we offer; here's contact information for all of our departments and staff; here are all the hours that each component of our club operates; here are the guidelines and rules we have for being a club member (re: dress codes, adults accompanying children in certain locations or activities, etc.).
  - The tone of the handbook is very welcoming and member-centric – We're so glad you've chosen to become a member; here are all the ways we hope you'll enjoy being a member; if there are any concerns, here's how you contact us and who to talk to.
  - Even though Beth Ami isn't a club and doesn't need to follow the above example piece by piece, having a welcoming Beth Ami handbook – even just online in the members-only section – would be very helpful. This would also mean that as there are changes, those changes could be incorporated online, so there's always an up-to-date Beth Ami Handbook to access and to be a resource.

### **Engagement Committee**

- Clarify the TBA membership value proposition:
  - Help people understand what we are getting out of our dues
  - Understand the point for our generation in our stage of life being there
  - Have temple help us recognize our needs and figure out what we need/want from temple
  - Stay true to who we are- Chavurah/neighborhood events.
- Consider re-instituting the term "Chavurah" instead of "Kehillah" – or at least tying the two terms together. Chavurah is much more familiar, and has a connotation of connection and family-type community. Although Kehillot are included in the weekly Up-to-the-Minute emails and the Chadashot, many members have no idea what a Kehillah is.
- Re-package activities - joint activities not just for one population segment
- Take the programming out of the building to where the people are, especially younger people; Increase offerings to downtown to engage young people
- More balanced programming: There is a lot of programming for older members, but not for under 40's and not for 14-18 year olds. Can we get lists of Jewish Camps? What happened to "here a sukkah, there a sukkah?"
- Develop "synergy" with other congregations and other community groups that are in the spirit of "tikkun olam" like "Rebuilding Together"
- Alternating events with daytime and evening times to better accommodate working congregants

- Micro-community events at various locations that match where congregants live i.e. neighborhood Beth Ami Shabbat dinners, services in D.C. where Millennial Jews are living
- Highlight youth accomplishments – give them center stage as they like attention
- Think of personal contact like the Amazon model – When you sign up with a username and password and use the site for a purchase the first time, you’re a “stranger”. The very next time you come back, and for all the times after that – your check-out is made easier and quicker – and on the site or through emails you get suggestions for items you may like, based on other items they already know you’re interested in. Not suggesting that Beth Ami be a software program or mechanized ... Just that no one who becomes a member or is an ongoing member should feel like a “stranger”.
- Scheduling: \_Be aware of the dates and times for Beth Ami activities that conflict with other Beth Ami or school schedules – and therefore try to schedule Beth Ami activities/groups on different days or same days but different times
  - For example: Beth Ami adult evening activities that are “out of time phase” from religious school hours – and therefore adults can’t participate in the activity and also drop off and pick up teen – [Note taker didn’t catch the specific times example, but like 6-8 pm instead of 7-9 pm]
  - Or Beth Ami activities that take place on the regular night for County PTA meetings for all middle schools or all high schools [Note taker didn’t catch the specific actual nights of the week – but hypothetically, like high school PTA meetings always being the second Tuesday of the month or middle school PTA meetings always the fourth Wednesday of the month]
- Newsletter is more timely and includes minutes from board meetings (could be on website - members’ area); perhaps newsletter could be emailed rather than mailed....which would allow deadlines to be later and would save money
- Better use of technology
  - Alternate ways to participate in activities – possibly through streaming video or recorded video only available to members through a password-protected space on the Beth Ami web site; or a weekend book group in addition to a week night book group If children are done with bar/bat mitzvahs, meet with the family (or just the parents) in person to talk about how Beth Ami can still be valuable and engaging to them in this next phase?
  - If a couple is going through a divorce, at least reach out and offer support ... and at an appropriate opening, offer how their connections to Beth Ami can be maintained or re-fashioned to fit their new situation?
  - Grow our pipeline by having activities (like NFTY) for high school students.
  - In addition to updating the web site, consider having a Beth Ami “app” for easy handheld access to key Beth Ami information – as well as a mode of accessing that information that’s especially more natural and appealing to younger members (and older members who also rely a lot on their smartphones).
  - Use of social media (i.e. pop up singles shabbat). Advertising events on social media.
- Assess the way TBA handles transitions, through the entire education pipeline and personal transitions like weddings, birth, divorce and death of loved ones. Perhaps directly address this issue with individual and family members at predictable stages. Examples:

#### **Spirituality Committee: Connectivity, Study, Services & Holidays**

- Emphasize social justice
- Clarify where TBA is / want to be on the Reform to Conservative spectrum, particularly as it pertains to the use of Hebrew words to describe temple functions and in services.

● Page 16

- Find our sweet spot—like Sixth and I, where programming is done differently for different audiences (they draw from the broader community). Anyone can come to Shabbat services and a \$35 dinner, they have a monthly calendar with religious activities (services, etc.); classes in everything from Mysticism to Mandarin; and keynote speakers and authors where they charge up to \$100/ticket.
- Second Seder – more organized things to do together on holidays
- End of year carnival in addition to Purim - doesn't have to be religious/Jewish
- Discussion of sermon topic after services
- Input into sermons - hey Rabbi we'd like to hear your opinion about XXXXXX; Online poll
- Food for after so people who rushed home to get to services can eat and not have to rush out to Ledo's for dinner
- More picnic shabbats not on holidays; Winter picnic shabbats inside
- Main service on Saturday: feels it's a service for the bar or bat mitzvah family alone. Make it more accessible and friendly to broader community
- Live and Learn programs that are available on weekends or evenings. Nice intergenerational opportunity
- Offer a chapel service more often (even if lay led) – During much of the calendar year, can be difficult for those who simply want a Shabbat morning service, because almost every week the service is geared around bar/bat mitzvah kids and families
- Changing melodies for prayers can be confusing – Any innovative ways to make new melodies more familiar over time? Many need melodies as an anchor, especially if they don't come to services multiple times a month. Maybe CD recordings of Cantor Larry that could be distributed for a contribution to the music programs of TBA (\$5 each or some other price?) with lots of prayer melodies
- Don't wrap certain holidays so much around limited populations – Like Simchat Torah or Tu B'Shevat – Or have more than one service, so families with older children and empty-nester members can celebrate the holiday, too

### **Social Action Committee**

- More emphasis on Jewish causes – locally, regionally, national, or internationally – If Jews don't support Jews, others won't – Now instead: Social action is supporting a local public school and a refugee family – worthy, but not as identifiable as Jewish social action on a broader scale.
- Return of the To Bring About booklet distributed at High Holy Day services, to encourage more participation in Tikkun Olam activities

### **Education Committee**

- Audience is extremely busy which is a challenge, yet has an interest in filling spiritual needs
- Education and inclusion/community is VIP
- Significant changes were made to the Beth Ami high school approach and curriculum, resulting in much more enthusiasm and engagement by high school students who participate. Strive for that same approach of freshness and innovation to other arenas of Beth Ami policies, practices, and programs.
- Assess the b'nai mitzvah program with implications and recommendations. Comments include:
  - Not seeing Bar Mitzvahs be so cookie cutter with same prayers and pirke ahvot and speeches; generate more opportunities for social connection across b'nai mitzvah students
  - Find ways to reduce or adjust the many inflexible rules around bar and bat mitzvahs – It's understood that there needs to be a certain consistent framework/structure around these events – However, review the rules for “common sense” needs – Like a different number of



chairs for an extended Kiddush where a number of older adults will need to sit down; and some of the rules around date-setting; Another example of inflexibility – When Beth Ami needs my help, it's based on the need for me to be a contributing member of the "community" (whether contributing financially or with volunteer time). When I need help making something work for me or for my family (re: a lifecycle event or other situation), it seems to be based on "this is the way we do things here".

- Said another way: One particular arena needing less rigidity – Some life-cycle events
- Example: Even though the bar/bat mitzvah population may be large, need to find ways to make the administrative/logistical/process aspects less rigid – more accommodating for parents and kids; more communication/education about why certain procedures/ rules are necessary; more openness to finding alternative win-win solutions
- One way to keep kids beyond bar/bat mitzvah engaged (example explained by a house meeting participant who had moved here from another state and therefore another synagogue) is to work toward a specific goal – like a senior project that's held in great esteem by the whole congregation – clergy made a big deal for years ahead about working toward the Siyum paper or project; 11<sup>th</sup> graders hosted the Oneg for seniors who completed the Siyum paper/project; part of the Temple calendar and noted as a big achievement [Siyum traditionally a celebration surrounding the completion of studying a unit of Torah or Mishnah/Talmud – Can be used more broadly as completion of any significant term of study]
- Hebrew School – needs more options/opportunities for "levels" of education; everyone kept to the standardized norm, but some kids do want to learn more and go deeper (even if an independent project or something "enrichment" offered to parents to help their kids with)
- Hebrew School/Sunday School options for parents/adults – not just drop off and leave – Do need to be mindful of working parents who want to use that time for themselves or other needs ... Possible innovative ways to give opportunities for self-directed learning or take-home activities or small group informal gatherings with topics?
- Need to address social aspects for kids in Machane (e.g. lack of youth group or ways for kids to interact socially, including boys & girls)
- Concern regarding curriculum (Holocaust studies) and impact on kids' desire to attend
- More student planned programs
- Work with Engagement and Financial Committees to work out incentives for nursery school families to join (more foreshadowing of what's to come in the Education program...)

### **Development Committee**

- Re: High Holiday and other fundraising drives: Very uncomfortable to hear talks about "This is why Beth Ami is important to me" as a prelude to "And therefore you should contribute" to a funding drive – More effective to frame more like "Why is Beth Ami important to you?" as a rationale ... and need to have enough of a rationale to touch enough people (enough connections for them to TBA)
- Need a development person either volunteer or paid; the risk is that we become too corporate—got to find a personal touch.
- We need feedback on donations—how is the money being used? Not just a list of names of who gave, but what did it accomplish? How close did we get to our goal? (compare to "Days for Girls" reports)
- Stronger Endowment: What is the clarity of our goals so we can ask for contributions?
  - Why don't we have an endowment?

- We don't ask and we don't say thank you people who give: Atid was frustrating—they spent so much on brochures, never got a note of thanks.
- Too many special funds: opportunity to consolidate?
- Instead of a general appeal/request for members who can afford it to contribute an amount to Beth Ami that is higher than their structured dues, or is in addition to their dues – offer specific things that additional contributions would be funding. For example, “A contribution of “\$ x,xxx” will subsidize the membership of one young family for a year” – so the contributor has a concrete feeling of doing something meaningful for their money, rather than simply contributing money to a “pot” that could end up paying the utility bill on the building.
- Increased creative ways to donate
- Crowd sourcing for a special event (i.e. raising money for movie “Angst”).

#### **Facilities Committee**

- Increase use of space for rental events: i.e. Adult Day Care for additional income as rental space, in concert with TBA's values and purpose.